



Agenda

Morning Session Agenda (2 hours)

11:00AM to 1:00PM ET

10:00AM to 12:00PM CT

8:00AM to 10:00AM PT

Welcome and overview: Teri Van Frank, President/CEO

Comments: Share One CUSO BOD

Questions/Answers

Client Spotlight: Jim Ryan, President/CEO JM Associates

Internal Credit Card Review: Melissa van Beurden

Close of morning session and 30-minute break

Afternoon Session Agenda (3.5 hours)

1:30PM to 5:00PM ET

12:30PM to 4:00PM CT

10:30AM to 2:00PM PT

20 enhancements for 2020: Bobby Rowland

Service and operations: Kim Young, COO

Salesforce Service Cloud: Zachary Miller

Break

Development and the plans of NewSolutions and NS3 products: Chris Dion, CAO, and Elena Martignon, API Director

Educational webinars: Crystal Hines

Close of afternoon session for In-House/Hosted clients

Special after session for Service Center clients: Katherine Garrone

Afternoon session will end for all